

Sustainable Forestry
within an Industry
Context

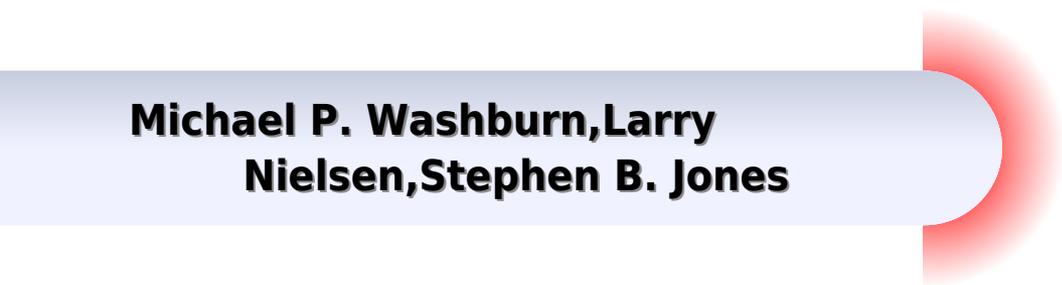
CASE STUDY

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A Case Study from "The Business of Sustainable Forestry"
A Project of The Sustainable Forestry Working Group

Business Of Sustainable Forestry Case Study Industry Context

**Michael P. Washburn, Larry
Nielsen, Stephen B. Jones**



Business Of Sustainable Forestry Case Study Industry Context:

The Business of Sustainable Forestry Case Study - Industry Context Tony Lent, Diana Propper de Callejon, 1999-06

The forest products industry ranks as one of the world's most important industries for the global economy and the environment. It represents close to 3% of the world's gross economic output. The forests upon which it depends are among the most critical ecosystems for the health of the planet and for human well-being. The size of the industry, its links to the rest of the world economy, and the importance of its resource base for environmental services make it the target of intense public scrutiny and government regulation. Understanding sustainable forestry requires understanding the evolving dynamics of the forest products industry, an evolution that is increasingly making the cost of wood a smaller fraction of the final value of a forest product. Two frameworks are used here as prisms through which to view the industry. The first section describes how the major business and environmental trends sweeping the industry are transforming Sustainable Forest Management (SFM) into a major industry force. It then outlines the most critical nonenvironmental drivers that make or break all businesses within the industry and explains how they will influence sustainability issues. The second section describes how all these forces play out within each of the three major industry segments: paper, solid wood, and engineered wood products, and maps out in which parts of the industry sustainable forestry is already a major issue, where it is not, and why. This approach makes sense given the history of SFM. Most sustainable forestry businesses have started from the forest, then tried to move forward to the market. An analysis that assesses the industry and links market conditions back to sustainable forestry supply capabilities reveals where sustainable forestry is well integrated, where it may not have much current opportunity, and where opportunity for closer end market integration remains untapped. The forces transforming the industry include tightening supplies, a shift in production regions, globalization, increased raw material efficiency, intensified product consistency, and heightened government regulation. Just as these forces are affected by environmental pressures, they also have environmental impacts of their own. As population growth and burgeoning economies spur the consumption of forest products, wood supplies are tightening worldwide. While no crisis is imminent, the industry is turning to new regions, especially South America and South Asia, as a source for wood. It is also gradually shifting from a supply-based, largely on natural forests, to one that depends on plantations, many located in the southern hemisphere. Just when environmental restrictions are curtailing wood production in many northern countries, heightened demand elsewhere is causing the industry to expand into delicate ecosystems in the Southern Hemisphere. Meanwhile, the industry is becoming increasingly globalized, with raw materials sourced throughout the world to create products for equally diverse markets. Shifts in producing regions and globalization are creating new opportunities for value-added industries in the southern hemisphere. Primary and secondary processing industries will follow wood supplies for financial reasons, as timber-producing nations try to capture a larger share of the production from forest products. These changes will draw significant investment to the Southern Hemisphere. Globalization

brings improvements in communications shipping and distribution that facilitate the transfer of knowledge about state of the art forest management techniques These same developments make the emergence of an international trade in certified forest products possible As capital travels to formerly untapped forest reserves for example those in eastern Russia the forces unleashed by globalization will exert even greater pressures on forests worldwide in the next twenty years Evermore efficient raw material use and increasing product standardization are also contributing to the industry's transformation Over the past several decades the industry has created many technological silver bullets that enable it to create more product from less wood The industry wide drive for standardization and consistency is moving down the value chain from final consumer products through to the forest Instead of emphasizing efforts to use individual species such as oak and cherry resources are now allocated to figure out how to make a vanilla feedstock such as rubber wood look and perform like oak or cherry Eventually this trend will lead to more investment in processing assets that can guarantee consistency and a movement toward either tree plantations or homogenization during primary and secondary processing Environmental forces have flexed their political and market muscles placing the forest products industry under intensifying public scrutiny and government regulation of its environmental performance New regulations and market initiatives are curtailing access to government controlled forest resources and influencing the management of private forests While a number of international agreements designed to improve forest practices might eventually affect the industry few now have the teeth to do so In the past five years certification has emerged as a nongovernmental initiative that may further transform the way the industry manages its forests Certified forest products are defining the market for wood products grown in an environmentally sound fashion While the full impact of certification is still unknown if it focuses the concerns of consumers and purchasers on the quality of the forest from which a product is harvested and if certification is widely adopted it could dramatically improve forest management and change markets How the business and environmental forces affect the paper panels and sawnwood segments of the industry will determine in large measure the future of sustainable forest products The paper industry with its massive capital investments huge pollution abatement costs extreme business cycles and susceptibility to buyer power has long been beleaguered The paper industry's recent shift to greater use of recycled paper demonstrates both its vulnerability to outside pressures and its ability to adapt rapidly to a new business environment Panels and engineered wood products may be a model for the future Products in this segment capitalizing on rapid fire technological advances are among the fastest growing in the industry From an environmental perspective these products ability to use a variety of woods now makes them more attractive than plywood the once dominant panel product On the other hand certified panel products will be much tougher to bring to market because it is so difficult to ensure that all the woods used in them come from sustainably managed forests Sawnwood products draw most of the attention from the certification community The sawnwood segment is more fragmented less capital intensive and adds relatively less value to its products than paper or panels Sawnwood

companies in temperate regions that produce hardwood will have opportunities to sell to markets opened up by a new resistance to tropical hardwoods. The forest management practices of softwood producers however are under heavy scrutiny and they will find fewer opportunities to leverage superior forest management. Although tropical countries are under enormous international pressure to improve their forest management practices, most of the internal and Pacific Rim markets they serve so far remain relatively uninterested in the environmental qualities of forest products. Niche opportunities though are available in Europe to tropical producers that can produce certified forest products. In the future the successful forest products company will understand and embrace the forces that are transforming the industry. Environmental trends are at the leading edge of these changes and will be instrumental in determining the industry's winners and losers. Companies that understand the role of the environment will profit by doing so. Those that underestimate the force of environmental issues will do so at their peril.

The Business of Sustainable Forestry Case Study - STORA James A. McAlexander, Richard A. Fletcher, Eric Hansen, 1999-06. We changed our attitudes we listened we learned we cooperated and we took the initiative. Granqvist supervising forester STOR. Over the past ten years Swedish forest products giant STORA has transformed its forest management to implement and verify a commitment to sustainable forestry. The company has hired a staff ecologist implemented ecological landscape planning brought local environmentalists into its management planning retrained its workforce and adopted new forest conservation measures. Most recently STORA became Europe's first major timber company to have a large block of its forests certified by a third party as sustainably managed. Headquartered in Falun Sweden STORA is one of the largest forest products companies in the world with 1996 sales of 5.9 billion. The company ranks fifth worldwide in paper and board production producing 1.9% of the world's production compared to 3.2% for industry leader International Paper Co. STORA sells primarily paper products but also runs four sawmills and is involved in power production banking and associated financial operations. The company owns a total of 2.3 million hectares of forest primarily in Sweden but it has holdings in Portugal and Canada as well. In 1996 STORA became one of the first large commercial forestry operations in the world to attain third party certification. The Forest Stewardship Council (FSC) the oldest and most credible certification system with environmentalists certified STORA's holding in the Ludvika district. STORA's size and its importance in the global forest products industry makes its actions a milestone in the development of sustainable forestry. As STORA's evolution towards sustainable forestry indicates certification has already become a strategic consideration for some forward looking companies.

The Business of Sustainable Forestry Michael Jenkins, Emily Smith, 1999-06-01. A range of powerful forces increasing demand for wood uncertain and decreasing supply increasing environmental pressures and growing markets for environmentally certified wood are changing the way the forest products industry conducts business. Forward thinking firms have recognized the significance of these forces and are developing a new business model one that will not only sustain revenues but can ensure the long term health of the forests upon which the industry depends. The Business of Sustainable

Forestry integrates and analyzes a series of 21 case studies of industry leaders carried out by the Sustainable Forestry Working Group. The motivations of the pioneering firms studied are as varied as their characteristics yet each has made significant progress. The authors of this book argue that the operations that have been most successful are those that have integrated sustainable forestry principles and practices into their overall corporate strategy. The book describes the forces that are pushing the industry toward sustainability, presents an overview of the new techniques and technologies that are making sustainable forestry more feasible than ever, presents in clear engaging prose company profiles that demonstrate both the promise of and the obstacles to sustainable forest management, gives a clear-eyed look at practices such as certification and their capacity to transform the forest products market, provides conclusions drawn from the cases by Stuart Hart of the University of North Carolina and Matt Arnold of the Management Institute for Environment and Business, offers a succinct set of lessons learned. **The Business of Sustainable Forestry**, 1998. **The Business of Sustainable Forestry**, Sustainable Forestry Working Group, 1998. This volume provides 16 detailed case studies of major companies representing each step in the commercial chain from forest management to retailing forest products. The studies from around the world demonstrate what the shift to sustainability means for businesses involved in forest products, some of the world's most important renewable resources. Introductory chapters characterize the process and the gains for all companies, organizations, and business schools engaged with sustainable forestry. **Case Study**, 1998. State of the World, 2000. Management of Agricultural, Forestry, Fisheries and Rural Enterprise - Volume II Robert J. Hudson, 2009-12-10. Management of Agricultural Forestry and Fisheries Enterprises theme is a component of Encyclopedia of Food and Agricultural Sciences, Engineering and Technology Resources in the global Encyclopedia of Life Support Systems (EOLSS) which is an integrated compendium of twenty-one Encyclopedias. Growing populations and expectations have placed extreme pressure on agricultural, forestry, and fisheries resources. Sustainability of resources and resource industries will be achieved only with commitment, ingenuity, and cooperation at unprecedented scale. The theme on Management of Agricultural Forestry and Fisheries Enterprises begins with an assessment of the organization of agricultural, forestry, fisheries, and rural enterprises, introducing community-based management, traditional small farms, cooperatives, and marketing boards, collective and state enterprises, and integrated global corporate systems. This is followed by thorough assessments of management systems for plants, livestock, forests, and fisheries. Plant management systems are based on genetic resources, water management, nutrient management, and agronomic systems. Livestock production systems are considered from the standpoints of genetic resources, range, and

pasture based systems landless systems and options for diversification Trends in the forest industry are revealed in terms of demand for a variety of products from forests evolving policy regimens and silvicultural developments The final topic addresses the complex issues surrounding sustainability of the world s fisheries This theme assess the evolving state of the main resource industries interpreting trends and identifying challenges and opportunities Contributors have attempted to project these developments and raise questions about their impact and role in a changing world Clearly they are part of an unfolding story of adaptation of the resource industries in an increasingly global society These two volumes are aimed at the following five major target audiences University and College Students Educators Professional Practitioners Research Personnel and Policy Analysts Managers and Decision Makers NGOs and GOs

Forest Value Chain Optimization and Sustainability Sophie D'Amours, Mustapha Ouhimmou, Jean-François Audy, Yan Feng, 2016-12-01 This book provides a global perspective on the various issues that the industry has to face as well as to provide some key global strategies that can help coping with those global challenges such as collaboration strategic value chain planning and interdependency analyses It presents literature reviews strategic research orientations assessment of some current key issues and state of the art methodologies

The Business of Sustainable Forestry Case Study - Parsons Pine Product Catherine M. Mater, 1999-06

Since the U S Congress passed the Endangered Species Act in 1973 and subsequently listed the spotted owl as an endangered species in 1990 the debate over the appropriate management of public and private forests has continued at a fevered pitch in the Pacific Northwest The listing of the spotted owl has led to the loss of tens of thousands of jobs in the logging and forest products industry which has leveled a heavy toll on many rural communities in Oregon Washington and California that have relied for decades on a robust forest products industry to sustain their economies In 1992 in Oregon for example the wood products industry was nine times greater as a share of the total Oregon economy than the industry was as a share of the total U S economy While heated debate in the press and at the grassroots levels continues surrounding these issues many remain unaware of a fundamental shift toward value added manufacturing that has occurred in the region s forest products industry Since the late 1980s employment in the secondary wood products industry in Oregon has increased from 27% to 40% of the total forest products workforce in 1995 according to the Oregon Employment Division Total employment in Oregon for logging operations sawmills and veneer and plywood operations dropped between 1990 95 losing over 13 000 jobs In contrast the value added and secondary wood products industry furniture millwork cabinetry and the like actually generated 11% more jobs during that same period and outnumbered total employment opportunities by a 2 1 margin for sawmills veneer and plywood operations and a 3 1 margin for logging operations By 1995 the percentage growth rate for value added wood production in Oregon outpaced the percentage growth rate of all other industry sectors in the state including the burgeoning high tech and electronics industry Although an apparent surprise to economists tracking the economic impacts of harvest restrictions in the Pacific Northwest the growth of the secondary wood products industry has

proven to be a stabilizing influence to the overall Oregon economy It has done so by focusing on making more product out of existing or in many cases less resource In effect the mandated harvest restrictions provided a unique two by four incentive to the industry to figure out how to maximize production with available resources The results were surprising Research by the Oregon Wood Products Competitiveness Corporation has documented that for every one million board feet of wood being processed into commodity lumber on the average only three full time family wage jobs are created Full time family wage jobs are year round positions that provide industry competitive wage rates with benefits If that same one million board feet in lumber were processed into component parts such as furniture blanks or table turnings an additional twenty full time family wage jobs could be created And if that same one million board feet of wood represented in component parts were then processed into quality furniture for consumer use another eighty full time family wage jobs could be created Even so industry adaptation to more value added wood product manufacturing has been slow Citing in part the difficulties in changing an industry culture and mind set Oregon s Wood Products Competitiveness Corporation determined in 1995 that less than 20% of the log volume harvested just in the central Oregon region alone found its way to secondary manufacturers in the Northwest Eighty percent of the total lumber volume approximately 1.8 billion board feet of timber was processed into value added product outside the western region This equated to between 4,000 and 25,000 missed job opportunities for the region because commodity lumber was redirected elsewhere Increasing value added wood product manufacturing in forest communities throughout the world may be as critical for achieving sustainable forestry as implementing new forest management practices Making more with less maximizing on the resources sustainably harvested and converting wood waste into wood profits and full time family wage jobs are all fundamental components of value added wood processing They provide the framework for achieving sustainable forestry and sustainable community development Parsons Pine Products located in Ashland Oregon a small community of 14,000 people based in the heart of spotted owl territory has been a pioneer and a leading advocate of value added wood processing for the last fifty years Once considered by many in the industry a maverick operation that often challenged traditional production assumptions and standard lumber grading rules today Parsons Pine Products has emerged as a unique example of sustainable forest practices that turn trash boards into cash rewards Its experiences in sustainable forest management SFM can be instructive for an industry in transition

The Business of Sustainable Forestry Case Study - Nonindustrial Private Forest Landowners Michael P. Washburn, Larry Nielsen, Stephen B. Jones, 1999-06

When business leaders government officials and other stakeholders come to the table in an environmental health or safety dispute acrimony often results leading to expensive and time consuming litigation Not only does this waste precious resources but rarely does the process produce the best outcome for any of the parties involved For the past five years the authors of this volume have conducted semi annual seminars at the Massachusetts Institute of Technology and at Harvard to provide business leaders and regulators with the knowledge and skills they need to more

effectively handle environmental health and safety negotiations Their strategy known as the mutual gains approach is a proven method of producing fairer more efficient more stable and wiser results Negotiating Environmental Health and Safety Agreements provides the first comprehensive introduction to this widely practiced and highly effective approach to environmental regulation The book begins with an overview of the mutual gains approach introducing important concepts and ideas from negotiation theory as well as the theory and practice of mediation The authors then offer five model negotiations from their MIT Harvard Public Disputes seminar followed by a series of real world negotiated environmental agreements that illustrate the kinds of outcomes possible when the mutual gains approach is employed A collection of writings by leading experts provide valuable insights into the process and appendixes offer both instructions for conducting model negotiation sessions and analysis of actual game results from earlier seminars This is the only prescriptive text available for the many regulatees and regulators involved in environmental regulatory negotiations each year Anyone involved with environmental negotiation including corporate and public sector managers students of environmental policy environmental management and business management will find the book an essential resource

The Business of Sustainable Forestry Case Study - Marketing Products Tony Lent, Diana Propper de Callejon, 1999-06 Most forest products analysts exploring the market for sustainable forest products have been searching for the green consumer They have assumed that the well documented consumer concerns about the impact of the industry on the forest would make consumer demand the dominant force propelling the industry toward sustainability While consumers concerns about the industry s environmental impact remain important many other more powerful forces are at work that will lead to an overall market shift towards sustainable forest management SFM These factors are converging to shift environmental attention on the industry from process controls and recycling to the management of forest resources Today a greater emphasis on the entire life cycle of forest products is pushing environmental concerns through the value chain from retail stores and pulp mills back down to the forest floor This paper assesses the major drivers and pressures on the forest products industry that are combining to bring about more SFM thereby significantly increasing the volume of sustainably produced forest products entering the markets The paper first looks at push drivers those drivers putting pressure on the industry pushing it towards greater sustainability Second external pull drivers are examined These are incentives that encourage the forest products industry to change its practices and operate more sustainably The third section describes how these push and pull drivers are converging to gradually create a market for sustainably produced forest products Finally geographic and industry structure factors are examined to identify how and where the transition to sustainable forestry is most likely to emerge

The Business of Sustainable Forestry Case Study - Menominee Catherine M. Mater, 1999-06 The Menominee Tribe has lived in northeast Wisconsin and on Michigan s Upper Peninsula for generations where ancestral tribal lands once encompassed more than 10 million acres Following several treaties and land cessions the Menominee people established a

Reservation in 1854 totaling 235 000 acres of predominantly timber land Since then the backbone to the economy of the Menominee Nation has been its forests and the industry surrounding the sustainable management of that resource The Menominee Tribal Enterprises MTE has been an engine of the Menominee economy over the last 140 years and within the last 30 years has pioneered the implementation of sustainable forest management SFM throughout the Menominee Forest Today the Menominees remain the only Native American tribe to have their forestlands independently certified as being sustainably managed They are also the only forestlands operation in the United States and Canada that holds dual environmental certification from both the Forest Stewardship Council approved SmartWood and Scientific Certification Systems SCS The concepts of sustainability in forest ecosystems and surrounding the communities that the Menominee have practiced for so many years include three components of a sustainable forest system The forest must be sustainable for future generations The forest must be cared for properly to provide for the many varying needs of people over time All the pieces of the forest must be maintained for diversity Looking closely at what MTE has accomplished in SFM and product development during the last twenty five years provides unique insight into the economic opportunities and constraints that face other forest products operations considering SFM practices With a twenty five year track record MTE is one of the few examples in the world where realized forest management performance over time can be compared with intended results to determine whether SFM actually does what it is purported to do Increase the quality and volume of wood grown in a forest system over time Provide more consistent and stable annual harvested timber volumes while maintaining or improving forest ecosystems Maintain or improve a forest ecosystem health that recognizes the value of multiple uses of a forest Sustain communities that surround the forest through job generation and the creation of educational opportunities Increase the value per unit of wood products produced from SFM forest resources through documented performance in the marketplace MTE s forest management choices may not apply to all forest products concerns MTE s management and decision making structure does not appear to be well suited to the management of larger private forestry operations in North America and Europe It could however be applicable to forest businesses owned and or operated by other tribal or native entities throughout North and South America and smaller privately owned forest products concerns worldwide Equally important MTE s process of managing tribal forests and the techniques it uses may be well suited for managers of public forestland throughout the world especially those required to balance the multiple use of forests and deal with the issues of community and public stakeholder trust in the management of the forests

The Business of Sustainable Forestry Case Study - Emerging Technologies
Catherine M. Mater, 1999-06 As experience grows with sustainable forest management SFM practices throughout the world one single factor continues to emerge as noncontrovertible SFM practices do appear to cost more to implement in the forest It is this factor that continues to drive the debate over whether SFM practices are economically feasible for the forest products industry If SFM proponents fail to recognize the importance of helping industry to increase the higher value of

wood produced with equal or less resource use than incentive based efforts to infuse SFM practices and certified wood product development into accepted industry standards will not succeed Finding ways to foster the adoption of emerging technologies that enable the forest industry to accomplish better bottom line results could prove to be of significant benefit to fast tracking the implementation of SFM practices worldwide Identifying these emerging technologies however and providing a pathway for easier entry into the market is no simple task This Emerging Technologies note highlights some of the most promising technologies techniques and strategies that may foster the implementation of SFM practices by offering improved environmental and bottom line results to the forest products industry

Pacific Forest Sector Outlook Study

2023 Nair, C.T.S.,Matta, R.,Kumar, R.,Lee, S.,Thomson, L.,2023-06-19 This outlook study focuses on the Pacific Small Island Developing States SIDS comprising 14 countries in the Pacific region Fiji Papua New Guinea Solomon Islands and Vanuatu Melanesia the Federated States of Micronesia Kiribati the Marshall Islands Nauru and Palau Micronesia and the Cook Islands Niue Samoa Tonga and Tuvalu Polynesia It examines the future prospects for forests and trees in the Pacific providing insights into potential pathways of change and options for achieving the Sustainable Development Goals SDGs The study was prepared by FAO in response to a request from the Pacific Ministers of Agriculture and Forestry and incorporates

information from country outlook papers thematic studies and various published and unpublished sources [The Business of Sustainable Forestry Case Study - J Sainsbury Plc and the Home Depot](#) Eric Hansen,James A. McAlexander,1999-06

Sustainable forest practices have become a pivotal issue within the forest products industry for a variety of reasons ranging from a broad sense of environmental awareness and responsibility to a more self interested concern for maintaining the economic productivity of forests Whether the forest products industry widely adopts sustainable practices however depends on their long term economic viability The development of broad demand and markets for sustainably produced wood products will be a key component of that economic viability The efforts of retailers J Sainsbury plc JS in the United Kingdom and The Home Depot HD in the United States to stock their shelves with products drawn from well managed forests place them at the forefront of this global issue These large respected retailers are uniquely positioned to merchandise sustainable forest products to the mass market and by so doing lend credibility to these products and demonstrate the importance of the issue to the industry and the public The buying power of these two companies is of such a magnitude that their purchasing practices can exert a strong influence on the forest products industry worldwide The initial programs of these two retailers and that of the 1995 Plus Group a group of major wood products buyers in the United Kingdom indicate that retailers and large wood products buyers will be instrumental in cultivating consumer awareness of certified products as well as pulling suppliers toward certification and sustainable forest practices A comparison of the activities of the two companies which operate in different competitive cultural and political environments identifies a variety of salient issues that will influence whether or not their initial efforts to market certified products are successful The ability of these retailers to obtain and

merchandise sustainable forest products is a barometer for the future direction of sustainable forestry The material presented is drawn from a number of different sources and research methods In depth interviews with senior executives wood products buyers marketers environmental managers store managers and retail employees from both companies were the primary sources of data These interviews were balanced by discussions with the 1995 Plus Group competing firms and suppliers visits to stores of both companies in different regions while posing as consumers and supplemented with a review of published materials

Forests, Trees, and People Newsletter ,2000

Conservation of Architectural Heritage (CAH) Antonella Versaci,Claudia Cennamo,Natsuko Akagawa,2022-04-27 This book discusses the fundamentals and practical applications of heritage conservation as an important tool of a city s development It presents case studies that demonstrate how to achieve a balance between the promotion of tourism industry and the generation of income while also seeking optimum sustainable methods for Conserving the City s Tradition and Identity The book in hand offers useful insights to a wide array of audience aware of the need to preserve the architectural beauty of cities such as architects policymakers investors and even the wide public who is interested in ways of conserving and protecting cultural sites

The Business of Sustainable Forestry Case Study - Collins Pine Eric Hansen,John Punches,1999-06 Born during the cut and run days of early twentieth century America Weyerhaeuser defied conventional industry logic by holding onto timberlands after they were cut rather than walking away By the late 1930s the company was faced with a decision What to do with previously logged land on which natural regeneration had been ineffective It decided to regenerate forests and grow timber as a crop first by seeding harvested areas 1940s and later by planting seedlings 1950s to present Beginning in the 1960s Weyerhaeuser began producing seedlings in nurseries and integrated replanting into its plantation operations Following this strategy Weyerhaeuser headquartered in Federal Way Washington has become the world s largest private owner of standing softwood timber North America s largest producer of softwood lumber and the world s largest supplier of softwood pulp Weyerhaeuser initiated sustained yield forestry to provide a guaranteed and consistent supply of wood not out of direct concern for the environment However the company has come to realize that by investing in a long term strategy their decisions have positive ecological and economic consequences that will amplify into the future Over the past thirty years Weyerhaeuser has developed a form of sustainable forestry based upon high yield plantations that are among the most productive in the world This high yield model provides higher returns while simultaneously minimizing overall environmental impacts by producing high quality wood and fiber on substantially fewer continuously regenerated acres In this sense the Weyerhaeuser Forestry model may facilitate both environmental and economic sustainability

Georgia Forestry ,1997

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